Engaging Customer Participation:
USAID's Organizational Change Experience

Prepared for the International Conference on Upscaling and Mainstreaming
Participation of Primary Stakeholders: Lessons Learned and Ways Forward
November 19-20, 1998

by

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I. Introduction

This paper discusses institutional changes that the U.S. Agency for International Development (USAID) has undertaken over the past five years. To be more effective in achieving its purposes as a development agency and better able to identify the results of its efforts, it began in l993 to adapt certain management concepts first developed in the private sector and then promoted by the U.S. Government-wide "reinvention" effort. One of the central ideas is that an organization identifies (and listens to) its customers and holds itself accountable for results that the customers value.

USAID identified as its "customers"—that is, the primary stakeholders[1]—the people of developing and transitional countries who are end–users or beneficiaries of USAID programs, typically poor people. The Agency began to reorient all its operating and management systems away from the imperatives of a traditional bureaucracy and base them on participatory planning, consensus among partners on a development hypothesis, greater transparency and flexibility, and increased teamwork and decentralization of authority.

The Agency also renewed its commitment to participatory practices and to the values underlying them. Open seminars, publications, and an electronic forum drew staff attention to the many ways in which USAID and others had been using participatory practices, from Bosnia to the Sahel, as well as to the practical impediments to their use. Also, jointly with many of its partners, the Agency articulated, tested, and actively promoted concepts of cross-sectoral partnering through which development programs better enable local public and private-sector organizations to lead their own development processes.

As a whole, these changes were, and remain, a very ambitious undertaking. In his closing remarks to the USAID Mission Directors' Conference in November 1998, Administrator Brian Atwood noted that participatory approaches are the way to achieve sustainable development, but that bureaucracy, red tape, and complacency can sometimes get in the way.

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[1]In this paper, the term "customer," or "ultimate customer," is roughly synonymous with the World Bank's use of the term "primary stakeholder." USAID defines customers as "those host country individuals, especially the socially and economically disadvantaged, who are beneficiaries of USAID assistance and whose participation is essential to achieving sustainable development results."

The term "partner" is equivalent to "secondary stakeholder." USAID defines a partner as "an organization or customer representative with which/whom USAID works cooperatively to achieve mutually agreed upon objectives and intermediate results, and to secure customer participation."

USAID uses the term "stakeholder" to refer to "those individuals and/or groups who exercise some type of authority over USAID resources such as Congress, OMB, Department of State, and those who influence the political process, e.g., interest groups and taxpayers." USAID also recognizes that "stakeholders" in the field include a full range of actors, including customers and partners and those who may be adversely affected by, or represent opposition to, development efforts.

USAID definitions can be found in the Automated Directives System (ADS) Glossary <www.info.usaid.gov/pubs/ads/glossary.htm>.

This paper, prepared by staff who have been actively engaged in the change process at a policy level and in the field, describes, in Section II, USAID's systemic changes as follows:

A.   The need for change
B.   Reengineering of USAID's operating and management systems
C.   Participation Initiative: building on what's best
D.   New Partnerships Initiative: programmatic commitment to local empowerment
E.   Office of Private and Voluntary Cooperations: building partnerships with PVOs
F.   Participatory development policy work with other donors

Section III discusses the results so far of these changes and reflects on a number of challenges that might face any organization undertaking such changes.

Section IV briefly presents seven lessons from USAID experience. They all illustrate one point: *our values, organizational structures, and processes profoundly affect our ability to promote primary stakeholder participation.* The lessons are:

1.   For our development efforts to yield real participation by primary stakeholders, the organizational system needs to reinforce a value shift.

2.   Partnership built into an operating system can facilitate primary stakeholder influence and empowerment.

3.   Primary stakeholder participation requires that program authority be decentralized sufficiently to respond to changing circumstances.

4.   Organizational change takes time and requires clear and sustained leadership.

5.   Successful organizational change builds on the organization's culture and best practices.

6.   Serious change requires major investment in training of both staff and partners.

7.   Major change in operating systems may create new needs for "governance" of the organization.

Section V outlines ways in which USAID is currently addressing the challenges of building customer participation more fully into its work.

We welcome the opportunity to contribute to the conference's discussion of "upscaling and mainstreaming participation of primary stakeholders." By "mainstreaming," we mean principally to make more routine those practices by donor institutions and development implementing organizations, whose effect is the fuller engagement of people in their society's decision-making processes. We prefer not to circumscribe the discussion to people's

participation within a development project; therefore, we welcome the attention focused on engaging primary stakeholders' participation in development strategies and policies. We note that the strategic plan developed by Development Assistance Committee of the OECD, and recently endorsed by the G–8 Heads of State, *Shaping the 21st Century* (OECD 1996), identifies full participation by both civil society and democratically accountable governments in the process of developing donor assistance strategies as critical to effective partnership between donors and recipient countries.

Perhaps more fundamentally, it is sound to remember that participation is essentially a matter of citizenship—a matter of people having access to opportunity and to the full range of their society's decision-making processes. USAID views participation not only as an essential feature of effective development work, but as a purpose of development itself. One of the Agency's goals is "democracy and good governance strengthened"; and USAID's Strategic Plan recognizes that "(b)road–based participation and democratic processes are integral elements of sustainable development." This is further reflected in USAID's mission statement, which states that it supports "the people of developing and transitional countries in their efforts to achieve enduring economic and social progress and to participate more fully in resolving the problems of their countries and the world" (USAID 1997).

II. USAID's Systemic Approach to Change

The Agency has undertaken a process of management reforms that, where fully implemented, significantly reduce the practical impediments to participatory, "customer-focused" behavior by USAID staff and partners. These reforms represent a systemic approach to change—one based on rethinking all of the processes and procedures that make up our operating and management systems. The idea is to ensure that the staff have the necessary information, authority, and incentives to work responsively to the perspectives of people in developing or transition countries who are the end-users of our efforts. Systemic changes—particularly the implementation of teams empowered to make decisions—permit genuine partnership in USAID's working relations with host country institutions, other donors, and implementing organizations.

A. The Need For Change

When Administrator Brian Atwood came to USAID in l993, major reforms were required. Cumbersome procedures kept the Agency from being very responsive to host country initiatives, and staff were often more preoccupied with meeting internal requirements than with addressing concerns raised by host-country partners. Procedures that ensured that the Agency met legal and ethical requirements with regard to procurement promoted insular habits and attitudes, and these tended to shield staff from views they needed to listen to. Timetables resulting from management decisions in Washington presented obstacles for efforts in the field to engage broader ranges of people in decision-making. In sum, many of USAID's procedures made it difficult to support dynamic processes in a society, particularly those involving the priorities and ingenuity of poor people.

The Agency's projects, laboriously designed in terms of input and outputs and managed throughout by experts, sometimes led to staff being able honestly to say that they had met all the projected implementation targets—but unable to say what if any impact USAID had on people's lives. Nor could they count on the impact to be sustained after project resources ended.

The Agency had for years been heavily criticized by Congress for a variety of reasons, a situation made worse by the fact that its financial systems did not permit it to show adequately where the resources were. Although progress had been made in results reporting, the Agency could not systematically discuss the results of its programs.

Earlier that year, the Clinton Administration's task force, headed by Deputy Secretary of State Clifton Wharton, had distilled the disparate claims on the foreign assistance program into a more focused mission centered on "sustainable development," but USAID's programs still responded to scores of different Congressional mandates and country-level developmental and diplomatic purposes. The l993 Government Performance Reporting Act (GPRA) required strategic planning and management systems well beyond what USAID had in place. The Administration, through the Vice President's National Performance Review (NPR), had

embraced this legislation as a basis to "reinvent government," streamlining its processes and more clearly articulating the value of government to the general public.

In the field, development professionals, including many of USAID's staff and partners, criticized the rigidities of the Agency's long project design processes. They faulted the emphasis on accounting for inputs and outputs at the expense of interacting with local people and called on the Agency to respond more fluidly to host-country development opportunities and to adjust programs as necessary to achieve results.

B. Reengineering of USAID's Operating and Management Systems

Responding to GPRA, NPR, and best practices

In response to the Vice President, Administrator Atwood in l993 declared USAID to be a "reinvention lab" to pioneer the approach set forth by the NPR. The Agency's mission and development approaches were defined, building the basis for the Agency's Strategic Plan as required by GPRA. The Agency worked with Congress to develop legislation to replace the cumbersome Foreign Assistance Act of l961, although this did not pass before elections brought a new Congress and new challenges.

In transforming the way it planned, implemented, and monitored its development efforts, the Agency built on its own best practices. Many USAID missions had successfully adopted strategic planning and performance measurement, and many staff and partners had for years used innovative, customer-focused approaches as well as collegial teamwork. USAID programs, therefore, already illustrated a rich array of participatory approaches.

The democracy program in the Dominican Republic, for example, was designed and managed by a broad-based group of Dominicans; in Malawi's agricultural sector, USAID had enabled the views of small farmers to challenge assumptions that it and other donors had held about the type of policies needing change; and the Agency's support to Bangladesh's Flood Action Plan empowered primary stakeholders by creating public access to information. In addition, the Agency had funded the development of important tools for participation such as manuals on participatory rapid appraisal, *The Green Book* (a citizen's guide to environmental policy analysis), and a shelf-full of materials by the Implementing Policy Change Project providing insights on engaging stakeholders and strengthening local consistencies for economic policy reforms (Brinkerhoff 1996).

New organizational model based on Agency's core values

The reengineering of the Agency's operating, management, and information systems aimed, like the reforms that had taken hold in some corporations and government entities, to transform the organization from the traditional fragmented hierarchy model to a more seamless structure that focused on desired outcomes and allowed greater flexibility in achieving them. The transformation process relied on the creative energies of several teams of

USAID staff, and was premised on the core values that they defined. In a traditional structure, they recognized, it is assumed that employees do not share the same goals as the organization and must be controlled through elaborate handbooks, diffusion of responsibility, and a multi-layered supervisory structure. This engenders "values" such as:

"It's not my job"
"I'm in charge of this process, so do it my way"
"Accumulating turf is the key to promotions"
"Decisions made up the hierarchy are more correct than those made below"
"We know what's best"(view of specialized units with limited perspective)

To serve as a broad statement on the behaviors sought in a wide range of situations (and thereby to reduce the need for USAID's voluminous handbooks and much of the controlling work), the reengineering teams identified the following four core values:

• Customer focus (rather than letting internal procedures define purposes and constrain
      performance)
• Management for results (rather than by inputs)
• Participation and teamwork (with partners, customers, and also within USAID)
• Empowerment and accountability (giving teams the necessary authority and holding them
      accountable for results, rather than micro-managing their actions)

A fifth core value, diversity[2], was added during the subsequent Business Area Analysis of the Agency's personnel policies and procedures.

Streamlined rules and experimental labs

After outlining new approaches to the Agency's work based on these values, between June and November l994 the reengineering teams translated the broad design into operational rules and information system requirements. They then drafted the Agency's core directives covering planning, implementation, and performance monitoring/evaluation, which replaced much of the material previously spelled out in the Agency's handbooks of regulations. These core directives were completed by October 1, l995, the date mandated for implementation of reengineering. The directives outline a new system for conducting Agency operations—one that clearly mandates participation.

The central feature of the new system is the strategic objective (SO). Decisions, resources, and activities are all organized around accomplishing a given SO, or significant development result. These are part of a strategy, developed collaboratively by USAID staff and partners in a given country and approved by USAID in Washington. Decisions about specific activities—how a given objective is to be accomplished—are made by the mission. The focus of supervision and leadership, therefore, is much less on how a set of approved activities (a

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[2]USAID's Diversity Plan defines this as valuing and appreciating the differences all employees bring to the workplace, while ensuring inclusion for all employees at all levels within the Agency.

project) is being implemented, but on whether the agreed-upon objectives and intermediate results are being achieved, and, if not, what changes might be required.

While the new operating system was being developed, Country Experimental Labs (CELs) were undertaken voluntarily in 10 missions. In each, staff sought to apply the new approach to some or all of the Mission's operations. Although an acceleration of the timetable for Agency-wide implementation of the new system meant that the CELs' experience did not (as originally intended) inform the development of the new directives, most of these experiences were remarkably effective in demonstrating some of the benefits of the "reengineered" approach, and continued to serve as seedbeds of innovation and learning.

Results valued by customers

The use of objectives, rather than sets of planned activities, permits flexibility that was not possible under USAID's previous operating system, which was defined by projects. Not only is the field empowered to make changes as necessary without seeking Washington approval—and thereby respond more fluidly to customer priorities—but the focus is more consciously on learning. Achieving results is intended to be a learning process in which Agency staff take risks and learn from their mistakes. They use information about results to make modifications in what they are doing, and they share lessons learned with others inside and outside the organization.

Challenges inherent in this approach (discussed more below) include choosing objectives that are developmentally meaningful while within the capacity of USAID and its partners to affect; coping with rapidly changing situations; defining indicators that are clear and objective but also measurable at reasonable cost; and using results effectively for management decisions.

For some, using the term "customer" to mean the intended beneficiaries (or primary stakeholders) of USAID's programs has been confusing. However, the term has also proved helpful in understanding and internalizing the implications for an organization that is aiming to streamline itself to focus on results that matter to people. In the business world, customers drive what the firm produces. USAID's new directives now require that its ultimate customers (end-users or beneficiaries of USAID programs) must be "actively consulted" in developing, updating, and monitoring strategic plans, and involved in monitoring performance (USAID, ADS). They also require that each unit "shall develop a customer service plan which informs its planning and operations." The plan should indicate how customer feedback will inform needs analysis and serve as a management tool to provide reality checks on whether the intended results are achieved.[3]

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[3]The use of customer service plans is also required throughout the U.S. Government by Executive Order 12862 "Setting Customer Service Standards," September 11, l993.

Similarly, in the business world, activities or processes that do not add value to the product, or that get in the way of producing the product, are to be questioned and perhaps eliminated. USAID recognizes as customers ("internal" or "intermediate" customers) any person or organization, internal or external to USAID, who uses USAID services, products, or resources to serve the needs of other intermediate or ultimate customers. Therefore, customer-focus in this context requires that USAID units work with each other and with its grantees, contractors, and host-country partners in ways that make serving the interests of the customer paramount. This is clearly a tall order for any organization where functions have traditionally been divided into separate, rather self-referential units with their own procedures and timetables.

Partnerships toward agreed-upon objectives

USAID has always conducted its work in collaboration with many other organizations. As budget limitations and other factors have reduced the size of many of USAID's missions in countries around the world, it is common for a small number of USAID employees (the majority of whom are host-country nationals) to manage programs conducted by a wide range of grantees and contractors in collaboration with other partner institutions.

With some partners, the relationship involves USAID funding to implement programs; with others, such as fellow donor agencies, USAID collaborates toward common objectives through separate or jointly funded programs. Partners include: U.S. private voluntary organizations, indigenous and international non-governmental organizations, universities, other U.S. government agencies, UN and other multilateral organizations, professional and business associations, private businesses, and host country governments at all levels. Over the years, USAID has increased the percentage of its programs implemented through non-governmental organizations, so that 34 percent of its development assistance in l997 was obligated through them. USAID has often engaged in quite reciprocal relationships with partners, just as it has often conducted itself in more directive ways.

The reengineered operating system is radically reframing USAID's relationship with partners, and hence with customers. To accomplish a given SO, a mission typically establishes a strategic objective team for each objective. The team is to include all those who are necessary to achieve the objective: the various players within USAID (e.g., technical specialist, program planner, contract officer, and legal advisor from the mission and perhaps Washington); the implementing partners; key host-country stakeholders; and sometimes collaborating donors. The idea is to engage the collaboration of all these as early as possible around a common vision of the objective and strategy as well as the program approaches.

Through SO teams (often called "expanded SO teams" in this form), partners are actively involved in defining both the objectives and the means of USAID's programs. An increasing number of USAID missions have adopted the use of expanded SO teams or some variant that involves active partner participation, often with rewarding results. Nevertheless, the Agency has a long way to go engage partners and customers as fully as set forth in its directives.

Recognizing that the SO team must carry out some important "inherently governmental" functions that cannot, under laws governing procurement and government ethics, be conducted with partners, the new system provides also for core SO teams to consist of only USAID employees. Many USAID missions and some units in Washington have adopted this form of organization, typically reporting improvements in efficiency as officials with previously separate responsibilities engage in greater teamwork. Lack of clear guidelines about how to engage partners in the work of SO teams without violating provisions regarding conflict of interest has contributed to many staff members reluctance to engage partners more fully in expanded SO teams. It has proven challenging to provide consistent guidance and clarity on rules, while also reducing regulations and encouraging innovation.

USAID partner organizations bridge the logistical, linguistic, and cultural gaps that often separate USAID from its ultimate customers. Partners often play the role of customer representative in the planning process and can ensure that customer needs are being effectively addressed by designing appropriate activities and monitoring customer feedback.

Other features of the Agency's reengineering transition process include measures to make USAID's personnel fully consonant with the values and methods of the new system. In l996, for example, "360 degree" personnel evaluations were instituted—meaning that an employee's ratings are informed by how well he meets the expectations of his peers, customers, and supervisees, as well as his supervisor. Efforts have been undertaken to make job classifications and precepts for promotion fully supportive of high performance teamwork, rather than only individual achievement.

Streamlining procurement processes and encouraging effective teamwork between program and procurement personnel has long been recognized as important, and efforts continue in this arena, as well as in improving the efficiency of budget and financial management systems. Also, measures are being taken to reduce delays and time demands caused by these systems which can reduce the ability of small overseas staffs to devote the necessary time to engage with customers and partners. Finally, the reforms include the design and gradual implementation of an ambitious new information management systems.

C. Participation Initiative: Build on What's Best

At the same time that the Agency began to reengineer its systems, Administrator Brian Atwood launched an Agencywide effort to strengthen staff commitment and capacity to use participatory approaches. Beginning with a day-long seminar in November 1993 at which Atwood presented his "Statement of Principles on Participatory Development" (Atwood 1993), the Participation Initiative has enabled USAID staff and partners to become more aware of the Agency's own best practices and to discuss frankly the practical issues of implementing them. Through its open discussions (seminars, workshops, and electronic fora), many staff readily identified their own best professional work with processes that "actively engage partners and customers in sharing ideas, committing time and resources, making decisions, and taking action to bring about a desired development objective" (USAID, ADS).

From early l994 through mid-l997, twenty-three Participation Forum sessions were held. These noon-hour open meetings served to raise awareness of how principles of participation have contributed to effective programs addressing widely different development challenges.

The sessions attracted between 50 and 150 staff, and were enhanced by e-mail contributions, before and following the sessions, from overseas staff. Summaries were distributed electronically to a self-selected participation network numbering nearly 900 staff, and made available electronically and in hard copy to others inside and outside of USAID. These summaries, as well as other participation resources cited in this paper, are available on USAID's Participation web site (USAID, Participatory Development). See Box A for examples of Participation Forum sessions.

Box A: Participation Forum sessions: examples of topics

Forum #3 *Participation in Policy Reform*
USAID experience in sectoral policy reform in Malawi, including lessons about participation in policy work is distilled from several countries by the Implementing Policy Change Project.

Forum #12 *From Clientilism to a "Customer-Service" Orientation:*
Features of Good Public Sector Programs
Political economist Judith Tendler relates effectiveness of certain public sector programs in northeast Brazil to whether agencies' front-line workers were permitted by their headquarters to customize services to beneficiary needs and whether communities were empowered to monitor their work.

Forum #15 *What Participation Means in Disasters and Conflicts*
Leaders of USAID's Bureau of Humanitarian Response, Office of Disaster Assistance [OFDA] and Office of Transition Initiatives [OTI] discuss with author Mary Anderson when—if ever—participation does not apply.

Forum#19 *Where Can a Broad Consultative Process Lead in a Global Program?*
Design of USAID's global HIV/AIDS program engages partners and customers iteratively worldwide.

Forum #20 *Bosnia: When Customers Tell Us What We Didn't Want to Hear*
Using "listening" techniques honed in other settings, USAID learns that its assumptions were wrong, and reorients a program involving itself and other agencies.

Forum #21 *Aligning the Purposes of Multiple Donors and Partners: Madagascar's*
Second Environmental Plan
USAID and World Bank staff describe how partnering among donors in Madagascar empowers the country to manage its own environmental resources.

Forum #22 *Citizen Monitoring and Evaluation: A View from Rural America*
USAID staff and partners learn from American citizens in poor communities of Appalachia how to make government programs more transparent and accountable to their customers.

Forum #23 *Participation in a Non-Participatory World: Lessons from Senegal's outreach*
to Customers and Stakeholders
Using a dramatic skit, USAID Mission staff review their experience in conducting a country-wide "customer survey" and engaging two hundred stakeholders in an atelier to develop a new Senegal-USAID strategy, and starkly lay out issues for USAID/Washington.

Another Participation Initiative activity consists of an ongoing series of brief case studies, Participatory Practices, examples of which are in Box B.

Box B: Participatory Practices series

PP #6 *Engaging Customers in Activity Design: Democracy Partnership in Bangladesh*
Bangladeshi employees, from specialists to secretaries and drivers, learn new "listening" skills, conduct extensive rapid appraisal across country; direction of USAID's democracy program is radically reoriented toward priorities voiced by poor women and men.

PP #11 *Procurement Alternative for Collaboration: USAID/Bolivia's Chaco Initiative*
SO team side-steps cumbersome procurement practices so that indigenous people's organization can play a lead role in shaping development in the Bolivian Chaco.

An Internet-based conversation group—Global Participation Network or GP-NET—enables over 500 USAID staff and development practitioners around the world to exchange insights, resources, and tools for participation.[4]

The Participation Initiative has also sponsored occasional day-long workshops and several training sessions in missions and Washington on using Rapid and Participatory Appraisal to "listen with new ears and see with new eyes."

During the first year and a half, the Participation Initiative was guided by an Agency-wide Participation Working Group (PWG). This reference group kept the initiative attuned to the concerns of staff and provided two-way, candid communication on management issues that affected participation. It provided timely input to the reengineering teams. The PWG also granted "ownership" of the Agency's Participation Initiative to the many staff throughout the Agency who had for years used participatory approaches, often struggling against the prevailing management practices to do so.

As the reform process moved forward, the various fora of the Participation Initiative shifted focus. Initially the goal was to sharpen people's awareness of participation; broaden their knowledge of what can be achieved; reinforce people's best instincts; and ensure that the value was integrated into the reforms of our operating systems.

Then, as contradictions, unintended consequences, and setbacks in USAID's reform process—some of them rooted in management practices adopted in the Agency's struggle for survival—appeared and aroused staff fears that the Agency lacked the will or capacity to

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[4]All development practitioners are invited to subscribe to GP-NET by e-mailing *ccharles@aed.org*.

persevere in the reforms, the initiative provided needed channels for two-way communications. These enabled management more clearly to hear and address some problems encumbering the process of mainstreaming participation, customer-focus, and teamwork. In turn, staff have gained encouragement and practical advice from the experience of Country Experimental Lab (CEL) and other missions that have substantially implemented the reforms.

D. New Partnerships Initiative (NPI): Programmatic Commitment to Local Empowerment

Whereas much of USAID's reform effort has been centered on changing "the way we do business," one reform process has been focused particularly on building local capacity and a policy environment conducive to participatory development. The New Partnerships Initiative (NPI) has fostered strategic approaches that empower local public- and private-sector actors to work effectively together.

NPI was announced by Vice President Gore at the UN World Summit for Social Development on March 12, l995, and developed through a highly participatory process involving many of USAID's non-governmental partners, including both U.S. private voluntary organizations (PVOs) and indigenous NGOs, cooperatives, business, foundations, universities, and other donors, as well as USAID staff in both Washington and the field. It defined USAID's commitment to promote local development partnerships among civil society, institutions of democratic local governance, and business, and to support such efforts through partnerships between local groups and their counterparts in the United States. It articulated the Agency's commitment to a vision of sustainable development premised on a robust civil society and multiple society-to-society linkages.

NPI highlighted the concept that the capacity of citizens at the local level to work together across public and private sectors is a fundamental building block of development. This focuses attention on the local-level significance of the concept of "sustainable development" as set forth at the beginning of the Clinton Administration in USAID's initial strategic document, *Strategies for Sustainable Development*. Because sustainable development is a "lasting increase in the capacity of a society" to improve the quality of life of people, and because development occurs locally (whether or not particular development efforts are conducted at a national or regional level), it requires that different parts of local society collaborate effectively.

The NPI framework identified two complementary building blocks: strengthening the capacities of local-level institutions (governmental, civil society, and business) to engage in partnership with one another, and improving the environment for local-level innovation, initiative, and strategic partnering by addressing national-level policy constraints and improving advocacy.

NPI also documented the experience of 15 USAID missions that chose to apply the NPI concepts in their strategic and programming decisions and to report on their experience. This

body of practice, analyzed and reported by the NPI Learning Team in January 1997,[5] dealt with issues such as how best to foster the national policy, regulatory, and resource environments in which private and community action can flourish; how best to increase the effectiveness and transparency of NGOs, small business groups, and local governments; and how to assess and promote collaboration across different sectors in a society. A succinct summary of lessons learned and a step-by-step guide is now available in *Partnering for Results: A User's Guide to Intersectoral Partnering* (Charles, McNulty, and Pennell 1998).

NPI encouraged missions to identify and reflect on the value of activities promoting partnerships, and offered an alternative to quantitative, sectorally-focused results. It challenged missions to strengthen their strategic plans by including more activities premised on the initiatives and collaboration at the local level of public sector, non-governmental, and business groups. It urged missions to aim for the sometimes intangible but developmentally important results such as increased capacity of different sectors to work together.

E. Office of Private and Voluntary Cooperation (PVC): Building Partnerships with PVOs

The mission of the Office of Private and Voluntary Cooperation in the Bureau for Humanitarian Response is to strengthen the capacity of USAID's PVO and cooperative development organization (CDO) partners to carry out development programs. Increasingly, PVC has directed its support for U.S. PVOs and CDOs to building the capacity of host-country non-governmental organizations (NGOs) and community groups to deliver sustainable services, particularly to underserved communities.

PVC administers two grant programs that strengthen the technical and organizational capacity of U.S. PVOs. Participating PVOs are required to mentor local NGO partners and to help them strengthen their capacities. PVC has played a leadership role in launching the current International Forum for Capacity Building of Southern NGOs (IFCB), which provides a platform for southern and northern NGOs to come together and identify capacity building priorities, plan future strategies, and create pilot programs to test new approaches. PVC also has taken an active role in the development of the Global Excellence in Management (GEM) Initiative, which offers innovative training programs, workshops, and consultant services to support institutional strengthening, partnership development, and cross-sectoral alliances for both PVOs and local NGOs.

In addition to capacity-building activities, PVC promotes networking and partnering activities. These engage USAID and U.S. PVOs, U.S. PVOs and local NGOs, and build intersectoral partnerships among civil society, businesses and governments.

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[5] NPI Resource Guide, available on USAID'S web site *www.info.usaid.gov./pubs/npi/npiresrc.htm*.

F.   *Participatory Development Policy Work With Other Donors*

Participation is best facilitated when there is a common commitment among donors to listen to primary stakeholders and, where necessary, when there is collaboration among them to encourage the host government to do likewise. USAID values the opportunities that it has had in recent years to work on these issues with other development institutions.

The OECD's Development Assistance Committee (DAC) vision for development assistance, *Shaping the 21st Century*, to which USAID actively contributed, provides a valuable, practical basis for collaboration in the field. As noted in the introduction to this paper, the DAC strategy sets forth in unequivocal terms the importance of citizens' ability to shape development priorities and to hold their governments accountable. It proposes a model of government, donor, and civil society consultation to assure full local ownership, and has led to eight pilot efforts in Africa and Latin America to implement this approach in democracy and governance programs, plus a more general pilot in Mali. Under the joint auspices of the Global Coalition for Africa and the DAC, the U.S., U.K., and France have recently supported a workshop in Bamako to advance these pilots, which secured enthusiastic endorsement from a broad range of partners.   It was also specifically endorsed by the G-8 Heads of State at their summit in Birmingham, England, earlier this year.

Staff welcome occasions, such as were afforded in l996 and l997 by the meetings of the Inter-Agency Group on Participation, to exchange insights with counterparts from other organizations about the process of institutional change.

As a result of the Agency's growing awareness of participation and that of other institutions, it is finding more opportunities in the field to collaborate with other donor agencies in customer consultation and participation. The nation-wide "customer survey" in Senegal, cited above in the description of Participation Forum No.23, involved staff from USAID and other donors going out together with government officials, NGOs, and other Senegalese stakeholders to villages and towns in all 10 regions of the country. This gave donor agencies a common basis upon which to collaborate in designing USAID's strategy and, perhaps, reviewing their own. In Bolivia, the resident representative of the World Bank and a leader of the Izoceno indigenous people's organization both participate as members of the SO Team working for natural resource management in the Chaco. In Zambia, USAID's health program was designed in active collaboration with other donors. The process involved joint team-building and stakeholder interviews, field visits to assess needs and opportunities, and strategic program design workshops (USAID, Participatory Practices).

III. Evaluating the Progress of USAID's Systemic Approach to Change

A. Stocktaking of Reforms in Agency Operations

Though not systematically collected or analyzed, the flow of information about the implementation of the reforms was sufficient in l997 to cause staff from various units to coalesce around some common concerns and proposed remedies. Clearly, the reform effort had stalled. Although some units had undertaken major reforms and reported significant improvements in performance and morale, in many others, and in much of USAID/Washington, the reforms appeared to have focused almost exclusively on planning and reporting results. Many units had implemented innovative and sometimes quite ambitious ways to engage customers and partners, but little had changed at an institutional level to further encourage these innovations. For example, teamwork was not well understood, and teams that tried to incorporate all the necessary USAID players and make decisions with extensive customer or partner engagement were, like any units in a traditional organization, subject to bureaucratic second-guessing, delays, and reversals.

It was also apparent that the reform effort had encountered some daunting obstacles. These included changes in Congress, drastic budgetary reductions, and a morale-devastating "reduction in force." Perhaps costliest of all was that senior staff were so immersed in these other issues that they were unable to coalesce around an Agencywide management plan to implement the reforms. The lack of attention to leading the reform effort, in turn, left those units and individuals that had most fully adopted the new approaches unsupported when their innovations collided with the "business as usual" of their bureaus or supervisors.

In November 1997, USAID undertook an assessment of the implementation and impact of the reforms in Agency operations. Sponsored on behalf of the Administrator by the Assistant Administrators (AAs) for Policy and Program Coordination (PPC) and Management (M), the effort was proposed and guided by a team of about a dozen persons from several bureaus and the field. This stocktaking was undertaken to identify where course corrections were needed. In the first of two stages, a team of staff and contractors assessed progress in achieving the intended results of the reforms by reviewing documents and reports, convening several focus groups, and conducting an Agencywide survey of staff attitudes, perceptions, and experience with respect to reengineering policies and practices. Over 600 USAID staff provided input, either through focus groups or survey responses. In the second stage, the team obtained the perspective of some 300 USAID partners, through several focus group discussions, individual interviews, and a survey that was generally comparable to the staff stocktaking survey.

Both staff and partners expressed frustration, disappointment, and sometimes anger at the perceived lack of commitment to the reforms by leaders—ranging from some mission directors up to the Agency's senior staff.

Staff and partners expressed strong support for the core values and the Agency's resulting

new approaches. However, both expressed dismay that the unintended consequence of the Agency's focus on results had been, in many cases, new and time-consuming bureaucratic demands. Many pointed out that these demands were preventing them from "real development work" involving site visits and greater engagement with customers and partners. In particular, partners criticized the use of indicators that tracked short-term, quantifiable changes rather than developmentally more meaningful progress such as institutional capacity building. They complained that such indicators sometimes distorted their work with customers and trivialized their interactions with USAID staff.

Staff expressed some satisfaction that the Agency was now consulting partners and customers more. By contrast, partners faulted the Agency for merely consulting them and often not--as USAID's directives called for—engaging partners meaningfully as members of SO teams.

The stocktaking survey showed that at the SO team level, host-country employees of USAID, and contractors reported considerably more use of customer and partner input in making decisions than did their U.S. direct hire colleagues. The staff survey showed that common sources of customer information were regular meetings with partners and site visits, while partners reported that they regularly consulted with USAID's customers through site visits, meetings, and telephone or e-mail interactions. The survey also revealed that partners' views and practices are far from homogenous.

Through the partner survey, as well as through retreats and other meetings conducted in each of the missions in preparation for a conference of all mission directors early this month, partners aired many frustrations about working with USAID. Through the survey, some partners called for better human relations, and emphasized the importance of such basic elements of partnership as mutual respect, courtesy, and consistently-defined roles and procedures. The partner retreats as well as the partner survey drove home the need to continue to streamline USAID's procurement practices, make them consistent with the Agency's core values, and train USAID personnel in their use.

B. Challenges of Change

The stocktaking exercises and other recent efforts to align and reenergize USAID's reform process highlight a number of challenges that might face any organization that is orienting its work toward results that customers value.

Having customers drive development strategies or programs requires knowledge, skills, staff time, and encouragement.   People who will be affected by development activities, even those whom the effort is clearly intended to benefit, often hold divergent views. While USAID's experience suggests that "just go out and ask them" is a necessary and very good first step, different techniques for consultation and active engagement of customers are often needed. Appropriate methods vary from one context to another. For example, Participation Forum discussions about disaster and emergency situations suggest that sometimes the best participatory approach is to observe the choices that people make and to respond flexibly.

Contexts change, as well. For example, in recent decades civil society organizations have grown dramatically around the world, and this has changed the roles that these societies need northern implementing organizations to play. And the explosion of electronic communications in recent years provides new opportunities and challenges for primary stakeholder participation.

Participation also requires innovations in management. Ways need to be developed to make customer consultation and engagement part of the ongoing business of the unit. When time and resources are in short supply, efforts to achieve participation will be sustained only if they contribute meaningfully to accomplishing the organization's work.

These challenges call for staff and partners to use knowledge and skills that may be new to them. Severe shortage of operating expense resources for training and resources for skilled facilitators—such as USAID has experienced in recent years—poses a serious obstacle to more rapid expansion in the use of participatory methods.

Achieving fuller "compliance" with the institution's commitment to participation is challenging at USAID because, under the new operating system, the mission—not USAID in Washington—determines how to go about the design, implementation, or monitoring activities. This arrangement, as previous examples have shown, can provide needed freedom to innovate, but, where senior field staff persist with "business as usual," change will be slow.

Another complication of responding to customers' priorities is that it may require a change of partners (as illustrated by the radical change in the Bangladesh democracy program cited earlier in the description of Participatory Practice No.6). Complicating this further is that as USAID reduces the size of its presence or withdraws from countries, it relies more heavily on partners to maintain its programs, and it distances itself further from customers. Finally, Congressional earmarks also constrain the effective influence of customers when they direct strategic priorities.

System overload is a danger. Designing and implementing changes while simultaneously pursuing development goals and downsizing staff is difficult. This is particularly true with regard to building customer participation more fully into Agency work. Resource constraints require that USAID pace its efforts enough to ensure that staff understand what is being required and why. There is the danger that unraveling old systems will create the impression that chaos reigns, especially when information and training lags and guidance is incomplete. Against this backdrop, communication about expectations and progress becomes vital to fend off cynicism and continue to build genuine support for fuller measures of primary stakeholder participation. Two-way communications are important, and repeated communication from senior managers is critical to impart a sense of urgency and focus to this agenda.

There are unexpected sources of change and there are constraints on our changes. For USAID, these have included externally imposed downsizing and government shutdowns. A current example is the Y2K problem, which requires significant resources and efforts to

address. In the countries where USAID works, natural and man-made disasters and rapid political or economic change all can require partially or totally changing the direction of our efforts.

There are constraints on the Agency's ability to change. USAID, as part of a broader government structure, lacks the authority to change systems such as procurement and personnel regulations, budget earmarks, and certain delegations of authority. Evolving thinking in the U.S. government about performance standards (how the GPRA is to be interpreted) also poses a special challenge for USAID.

Reforms require monitoring, management, and correction. Until l998, when USAID's Management and Policy Bureaus joined to carry out the stocktaking and subsequently established an ongoing collaborative mechanism to ensure the timely resolution of operations-related issues, "a thousand flowers bloomed"—but no one was there systematically to assess their relative merit or to provide needed clarifications on Agency practice. One outcome was that an aspect of the reforms intended to increase the Agency's flexibility and ability to respond to customers—the focus on results—in practice led to cumbersome, overly elaborate reporting systems and time taken away from listening to customers. Major corrections are currently being undertaken to realign the results management system.

As described in Section V, this correction is one of many underway to strengthen the clarity and usefulness of the Agency's rules and internal governance, to build staff and partner skills, and to align systems such as procurement and personnel systems with the Agency's core values of customer focus and participation.

IV. Lessons Learned About How to Make Customer-Focus a Reality

USAID's experience since l993 in more consciously and deliberately using participatory approaches, and in reinventing its systems to permit a customer focus, has enabled staff to deepen their awareness of important, if quite fundamental, lessons. For example, many USAID staff and partners have more fully internalized the belief that program effectiveness depends on customers driving the development process. Development organizations can advise, catalyze, assist, or choose not to assist, but the decisions about development priorities and policies must be reached by the host society. The sustainability of results depends on local ownership—on the commitment of primary and secondary stakeholders. Moreover, experience with customer surveying of various sorts has convinced many staff that it is feasible, at reasonable cost, to involve large numbers of primary stakeholders in setting strategic objectives or defining approaches.

The most useful lessons learned that USAID can now share lie in considering how its organizational structures and processes, as a donor, affect customer participation.

LESSON ONE. For development efforts to yield real participation by primary stakeholders, the organizational system needs to reinforce a value shift.

USAID missions that have "listened" to customers on a large scale—as in Bangladesh and Senegal (detailed in Participatory Practice No.6 and Participation Forum No.23, cited earlier)—have broken out of a "business as usual" mindset. In Bangladesh, a large number of the entire mission's workforce—including secretaries and drivers—were mobilized to undergo training in rapid appraisal and to fan out across the country to conduct attentive, iterative interviews with some 500 women and men to gain a preliminary sense of how they perceive their problems and needs and subsequently to validate planned activities for a new democracy program. The same Bangladeshi employees used their skills subsequently to assess needs and validate activities in the health and economic growth sectors. This mobilization of Mission resources was possible only because listening to customers was recognized as a paramount value by the Mission's leadership; because the separate programmatic boxes of a traditional organization had been permeated by teamwork; and because innovation and experimentation were deliberately invited by the Agency's use of Country Experimental Labs.

LESSON TWO.   Partnership built into an operating system can facilitate primary stakeholder influence and empowerment.

In Senegal, many Senegalese government officials, representatives of donor agencies, and local NGOs engaging with USAID in planning and carrying out an ambitious survey of peoples' perspectives on development priorities in villages and towns throughout the country—and thereby honing a common vision of the country's needs and aspirations—enabled all these partners, and many additional Senegalese stakeholders, jointly to develop a new strategy for USAID's work in Senegal. They did so through a three-day atelier that engaged some 200 participants in concurrent small-group strategy-planning workshops. Paramount in all these sessions were the priorities expressed by Senegalese

primary stakeholders.

In Bolivia, the leader of the Izoceno Guarani Indians actively participated on an expanded SO team that helped accord the Izocenos a leading role in shaping the fate of the Bolivian Chaco region. The Izoceno organization, which now provides technical assistance to other indigenous groups in Bolivia, Argentina, and Brazil, has been in charge of managing the Kaa-Iya Chaco National Park since 1995. The collaborative relationship forged with USAID and others through the SO team empowered the Izocenos, later, to negotiate effectively with the international oil consortium that was building an oil pipeline through the park. As a result, the Izoceno organization is in charge of setting the environmental impact mitigation measures that must be taken.

LESSON THREE. Primary stakeholder participation requires that program authority be decentralized sufficiently to respond to changing circumstances.

USAID/Bolivia helped create PROSALUD, an NGO that delivered health services throughout two large municipalities. PROSALUD would establish a community-based board in each neighborhood where it worked, and this board decided what services would be provided and what fees charged. When the government embarked on a major decentralization process that put local governments in charge of local health programs, there was a huge increase in demand for PROSALUD services. Had USAID not reengineered its systems, enabling PROSALUD to expand its reach to additional municipalities would have involved a delay of a year or more to permit Washington approval of an amendment to the project. As it was, the SO team was already empowered to shift resources and redesign its support for PROSALUD as necessary to achieve the general objective. It could therefore immediately turn its attention to assisting PROSALUD to meet this much larger opportunity.

LESSON FOUR. Organizational change takes time and requires clear and sustained leadership.

Many USAID employees, including the Administrator and senior staff, have found relevant a book by John Kotter of The Harvard Business School, *Leading Change*. This short book, as well as observations of other "reinvention" efforts, helped USAID recognize and take measures to correct the small degree of engagement by Agency senior leaders below the Administrator in leading the reform process. Staff have also learned that the use of teamwork at the bottom of an administrative hierarchy (USAID's SO teams) is problematic when supervisors and leaders lack the experience of teamwork and underestimate the consequences of overturning team decisions or withholding authority. This can seriously damage morale and undercut the credibility of the reform effort. The Agency is now taking measures to encourage the use of teams at higher levels in the organization both to improve efficiency and to broaden experience with and support for teamwork values.

LESSON FIVE. Successful organizational change builds on the organization's culture

and best practices.

USAID deliberately sought to do this in the way it went about designing the new operating system. It was developed by teams of USAID staff, based on Agency practices that they identified as best practices. This approach was continued in the CEL experiences and later in the experimentation and learning encouraged by the New Partnership Initiative. The Participation Forum and other Participation Initiative activities focused attention on the ways that USAID staff overcame practical problems, while also bringing the experiences of other development practitioners to bear on issues of current concern to staff. The Participation Working Group, the Agencywide reference group that guided the Participation Initiative, helped ensure that the increased emphasis on participation at USAID has been welcomed by most staff, as reflected in the recent stocktaking. It has not been viewed as externally imposed.

LESSON SIX.   Serious change requires major investment in training of both staff and partners.

Change of the sort that USAID has set out for itself requires that employees and partners internalize the core values and how the apply to Agency operations.   Effective teamwork requires that team members—as well as senior managers—understand their new roles in getting work done efficiently in a team setting. New ways of thinking must be learned that focus on strategies and tactics for achieving results that matter to customers, rather than on elaborate project planning. New operating procedures need to be learned, with new (and streamlined) documentation requirements. Presenting development hypotheses to relate intended intermediate results and strategic objectives involves new skills, as does defining measurable indicators and engaging customers and partners in the monitoring. Engaging partners and customers in strategy development or program decisions requires not only a mastery of teamwork skills, but an understanding of the limitations on their participation necessitated by procurement law and other regulations.

LESSON SEVEN. Major change in operating systems may create new needs for governance of the organization.

The replacement of USAID's old regulations with streamlined directives that had not been fleshed out adequately through training and supplementary guidance left many staff unclear about required procedures. In turn, interpreting Agency policy with regard to new operating processes tended to fall in between and outside of the established arenas of governance of existing bureaus and offices. As current measures to correct course have confirmed, in a situation of rapid organizational change employees and partners must know where to turn for authoritative answers on policy as well as for guidance and suggestions for how to approach unfamiliar new processes.

V. USAID as a Learning Organization: Where We Go From Here

Systemic changes remain necessary to make it possible for USAID's efforts to contribute more fully to enabling the needs, visions, and initiatives of primary stakeholders to drive development. Thanks to current efforts to "correct course" to pursue the reforms vigorously, these changes are likely to become integral to the Agency's culture and structure. This was confirmed in many of the discussions by mission directors at their worldwide conference held in November 1998. In addressing the conference, the Administrator expressed the desire and the expectation that these reforms in the way we do business constitute a lasting heritage that will enable USAID to respond more effectively to customers and work more effectively with our partners.

Using the stocktaking findings to inform their actions, Agency leaders have generated new momentum for the Agency's commitment to participation. Recent actions include:

Clarifying rules of the game. Since April l998, the Bureaus for Policy and Program Coordination and for Management have worked together through a joint M-PPC Operations Governance Team to ensure that issues that require clarification or resolution in the way the Agency conducts its work are fully addressed.

- One such issue that is being resolved is the confusion and uncertainty over how partners and customers may participate in the work of SO teams while avoiding violations of Federal regulations and sound procurement practices. Lack of clarity on this has contributed to widely inconsistent practice and sometimes to tensions and mistrust between USAID and partners. A revised, detailed, and much clearer guidance document is currently being circulated to staff and partners for comment.

- Another action by the Operations Governance Team has been to make the Agency's directive system more accessible to staff and partners.

- Addressing a major source of distress for staff and partners, the Agency has just revised the performance and reporting system. A working group tasked by the Administrator has recommended measures to greatly simplify the reporting and review process and to eliminate performance measures that are not useful for program management in the field.

Building staff and partner skills. The Agency recognizes that it has vastly under-invested in staff and partner training, partly as a result of severe budget reductions. Within the limitations of a very tight budget, and making innovative use of the expertise of its staff to serve as trainers, the Agency has instituted major new training programs.

- For the first time since the reengineering of the Agency's program operations, training in the specifics of Agency operational approaches, policies, and procedures—including the engagement of customers—is being provided. The week-long Reaching 4 Results

workshops, taught by Agency staff subject matter experts, are providing instruction to some 500 staff and partners in 10 countries by next spring. Meanwhile, contracts have recently been awarded for a new leadership and program operations course, and for a new course on procurement for technical officers.

- In addition, there is renewed Agency commitment to share and further develop lessons learned about intersectoral partnering at the local level—the approach developed through the New Partnerships Initiative. Plans are underway for mission to mission mentoring, regional conferences, Internet-based networking for exchanging experience, and technical assistance.

"Walking the talk" through personnel actions. New precepts for promotion and revisions in Agency awards and incentives are being developed, which will bring these all-important instruments for Agency leadership more fully in line with Agency values and policies.

As these examples illustrate, over the past year the Agency has made major strides to address specific issues of intense concern to staff and partners and to reenergize the reform process as a whole.

Equally important, the Agency has substantially grown in its capacity to be a "learning organization," that is, to continually evaluate its experience and to make changes in direction, approach, and procedures as necessary. USAID is committed to hold itself accountable, through the annual reporting process mandated by GPRA, for Agency progress toward the intended outcomes of the systemic reforms. Prime among these is that USAID's strategies and programs should be shaped by the priorities, vision, and initiatives of primary stakeholders—Agency customers.

The Agency welcomes continuing collaboration with and learning from the experiences of other development agencies and partners, as well as from those of other U.S. government agencies undertaking customer-focused systemic change.

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